

Curriculum Guide for Preceptors
Intermediate Care Facility/Individuals with Intellectual Disabilities (ICF/IID)

Introduction

This guide assists the State Agency (SA) Preceptors in planning training for new surveyors in Federal programs. For each Federal program, a basic training timeline is given including both required (marked with an asterisk [*]) and recommended classes and presentations.

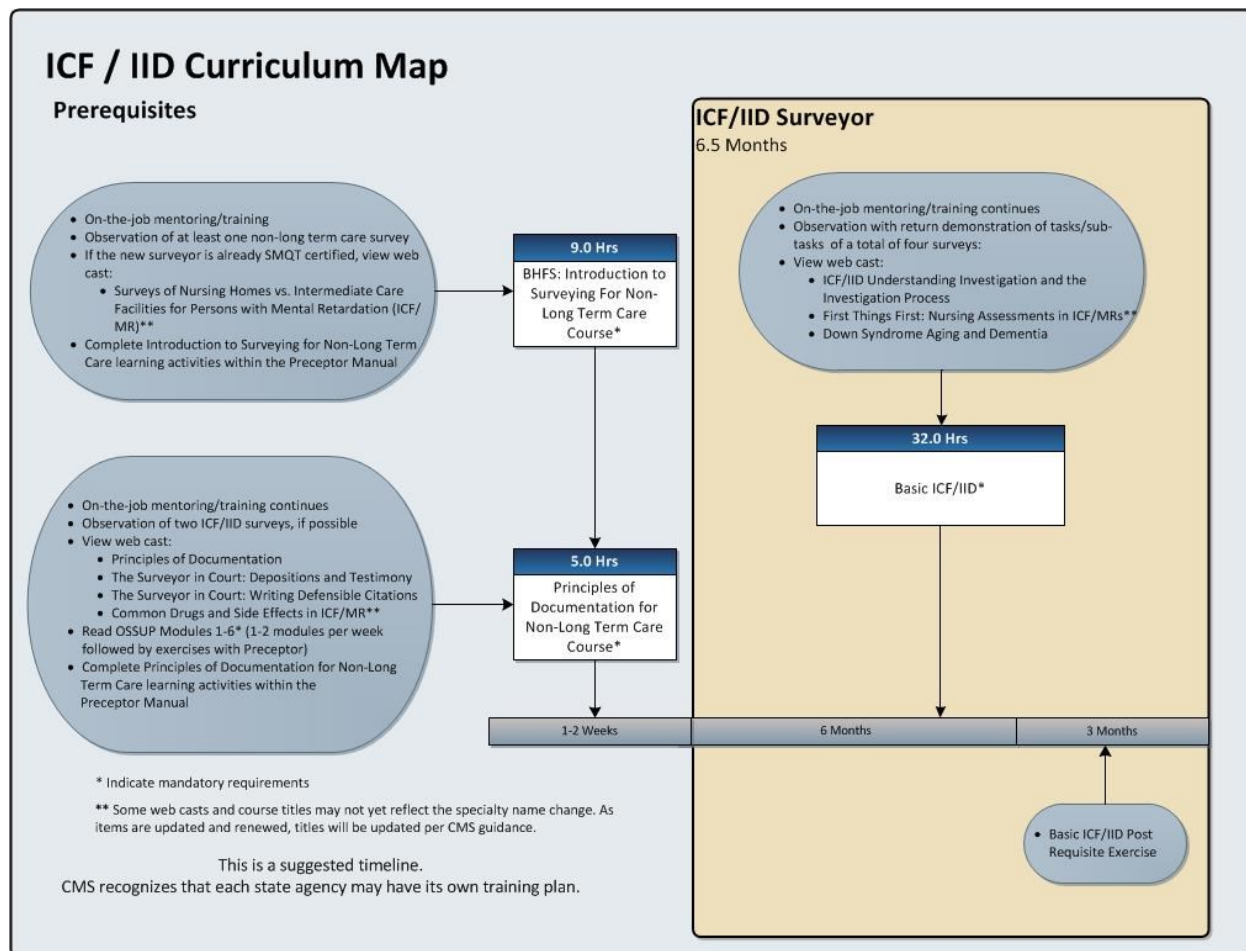
As a general guide, students should be scheduled to attend basic Centers for Medicare & Medicaid Services (CMS) training when they have an understanding of the related regulatory process, have completed any Federal (or state) prerequisites, and have related field observations. The SA Training Coordinator and other agency personnel, as appropriate, should evaluate each surveyor individually to determine progress during the orientation period. CMS recommends a certain number of observational surveys for the new surveyor, but that number may be flexible based on the volume of surveys available.

The average time required before a student has completed the prerequisites and has an appropriate knowledge base to successfully complete a basic CMS course is three to six months. Remember a student cannot register in the TotalLMS for a basic course until the prerequisites are complete.

All referenced satellite broadcasts are on the surveyor training web site at [CMS Surveyor Training](#). Archived webinars are listed with the corresponding link; however, surveyors must register in the TotalLMS if the surveyor wants credit for having viewed the archived webinar.

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- Orientation and state level training begins.
- Completion of Introduction to Surveying for Non-Long Term Care* online training within the first two to four weeks of employment is recommended. The course is self-paced, web-based training, and takes approximately nine hours to complete. Once enrolled, the surveyor has three months to complete this training.
- Continue introduction to the survey process and begin field experiences. If the Intermediate Care Facility/Individuals with Intellectual Disabilities (ICF/IID) surveyor is already Surveyor Minimum Qualifications Test (SMQT) have him or her view the webinar “Surveys of Nursing Homes vs. Intermediate Care Facilities for Persons with Mental Retardation (ICF/MR)”** at [ICFMR vs. Nursing Homes Webinar](#) which explores the differences between the two surveys.

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- Completion of Principles of Documentation* (POD) online training within the first three months of employment is recommended. The course is self-paced, web-based training, and takes approximately five hours to complete. Once enrolled, the surveyor has two months to complete this training. The preceptor should correlate this training to the development of actual deficiency statements, providing continuing examples and opportunities for the orientee to practice and improve new skills.
- Read the Online Supplemental Support Program (OSSUP) Modules 1 through 6. This is a compilation of documents that focus primarily on dignity, proper terminology, evaluating situations in the ICF setting, etc. The document is approximately 150 pages long. Ideally, the preceptor should have the orientee read small segments and review the material and exercises with the orientee. Suggested completion of one to two modules per week is recommended.
- Once the above prerequisites are completed, schedule surveyor for Basic ICF/IID.*
- During the orientation process, the following webinars may be viewed:

- ICF/IID Understanding Investigation and the Investigation Process at [Effective Investigation Webinar/](#)

It is highly recommended that this be viewed prior to the surveyor going out to his or her first field experience.

- First Things First: Nursing Assessments in Intermediate Care Facilities for Persons with Mental Retardation (ICF/MR)** at [First Things First: Nursing Assessments in ICF/MRs](#)

This webinar is aimed at increasing the surveyor's knowledge base regarding nursing assessment in the ICF environment. It may be viewed at any time during the orientation period.

- Down Syndrome Aging and Dementia at [Down Syndrome, Aging, and Dementia Webinar](#)

This webinar is aimed at increasing surveyor knowledge base. It may be viewed at any time during the orientation period.

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- The following archived webcasts are recommended during orientation:
 - Common Drugs and Side Effects in ICF/MR**

This is an informative webcast for increasing the surveyor's knowledge base. It is appropriate for the ICF/IID surveyor and any other surveyor who interacts with this population. For new surveyors, this may be viewed at any time during the orientation period.
 - Principles of Documentation

This informative webcast highlights the POD, including an explanation of each principle and an examination of a specific case law example where the statement of deficiencies was not adequate. This is recommended as a refresher for all surveyors, regardless of provider type. For new employees, it is recommended that this be viewed after the online POD class. Ideally, this program should be viewed while the orientee is actively learning to construct deficiency statements. The preceptor may also want to use this broadcast in small segments, providing examples of each principle throughout the webcast to enhance the learning experience.
 - The Surveyor in Court: Depositions and Testimony

This informative webcast highlights the role of the surveyor when giving testimony with vignettes and subject matter expert examination of the surveyor findings and testimony specifically related to Immediate Jeopardy (IJ). This program is highly recommended for any surveyor. For new employees, this webcast is ideally viewed after the orientee has some field experience and understands the definition of IJ.
 - The Surveyor in Court: Writing Defensible Citations

This informative webcast highlights the pitfalls of inadequate investigation and weak Form CMS-2567s. Video clips of surveyor interviews and courtroom testimony are used to pinpoint weaknesses and identify strategies to avoid similar events. While the case presented is from a long-term care perspective, this webcast is highly recommended for all surveyors. For new surveyors, this program should be viewed during the latter part of the orientation when the surveyor is actively learning and applying investigative skills and writing Form CMS-2567s with the guidance of the preceptor. Ideally, the POD course and POD web-cast should be completed before viewing this web-cast.
- After Basic ICF/IID* is successfully completed, the surveyor may survey independently but mentoring should continue as indicated.

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- Surveyors must complete the Basic ICF/IID Post Requisite Exercise 3 months after course completion.

** Note: Some web-casts or course titles may not reflect the name change of ICF/IID. These titles will be changed as the material is updated.